

SECTION VI
MILWAUKEE COUNTY DEPARTMENT ON AGING
SPECIALIZED ELDERLY TRANSPORTATION SERVICES
PROGRAM/SERVICE GUIDELINES

Applicant for Milwaukee County Department on Aging funding to provide Specialized Elderly Transportation Services must comply with program/service guidelines as stated below. Applicant must describe how they will meet specific program/service guidelines in appropriate section(s) of Exhibit I, Description of Proposed Programs and Services.

1) Program Activities

- a.** Specialized Elderly Transportation Services provides advance scheduled door-to-door transportation on an individual or group ride basis for mobility impaired older adults. Services include assisting clients in boarding and leaving vehicles, carrying packages, and escorting clients to an entrance or from an exit. Passengers must be seated with seatbelts secure before proceeding. Drivers must carry grocery bags inside a client's home, condominium, or apartment building and place them down in a location that does not obstruct anyone from entering or leaving the building. Drivers must offer to carry items purchased by riders on general shopping trips in a manner consistent with the grocery bags requirement.

Service hours for medical or dental appointments operate Monday through Friday between 7:30 a.m. and 5:30 p.m. Service hours for other trip purposes operate Monday through Friday between 8:00 a.m. and 5:00 p.m. Specialized Elderly Transportation Services restricts trips to origins and destinations within Milwaukee County, unless authorized under Section 2(c).

The applicant must provide a complete written description of how they will provide eligible Specialized Elderly Transportation Services passengers with service for the following trip purposes:

- (1) Individual rides for medical/dental appointments or related treatments/therapy;
- (2) Group rides for weekly grocery shopping (see Appendix I);
- (3) Group rides to selected nutrition sites of the Milwaukee County Senior Meal Program (see Appendix II);
- (4) Individual and small group rides to selected nutrition sites of the Milwaukee County Senior Meal Program (see Appendix III);
- (5) Individual rides for weekly grocery shopping for persons not eligible for group grocery shopping services;
- (6) Individual rides to visit a spouse, relative, or friend living in a nursing home;
- (7) Individual rides for general shopping or to obtain a voter ID, and
- (8) Any other trip purpose approved on a case-by-case basis by the Department on Aging contract manager.

No change in services (including reductions in service availability) may occur without prior approval from the Department on Aging contract manager.

Services under Appendix I are by definition group trips and reimbursed at the group grocery shopping rate regardless of the number of persons served. Services under Appendix II are by definition group trips and reimbursed at the group meal site rate regardless of the number of persons transported except when described as follows. Rides to group meal sites may be billed under the individualized or small group rates only if all of the following apply: (1) fewer than four passengers are transported to or from the group meal site and (2) the farthest pickup pointed is greater than five (5) miles from the Clinton and Bernice Rose Park Senior Center or Lakeside Senior Enrichment meal site, and greater than four (4) miles for any other group meal site as identified in Appendix II.

Several group meal sites occur at senior centers offering afternoon programming. The applicant must facilitate client participation in afternoon programming by working with senior center directors and the Department on Aging contract manager to identify when adequate ride demand exists to offer two return rides. When two return rides are offered one should occur following conclusion of the meal and the other based on afternoon programming.

Appendix III lists other meal sites whose participants are eligible for individual or small group rides.

(Include in Section 2.0, Part 2a of Exhibit I)

- b.** Medical rides include transportation for any generally recognized medical or dental examination, treatment, or therapy. When questions arise regarding whether a given service request falls under the medical ride definition, the service provider must contact the Department on Aging contract manager for determination. Persons receiving medical rides must make a \$3.00 co-payment for each one-way ride. The service provider must use this co-payment as an offset to the cost of providing the ride. Accordingly, the proposed unit rate for medical trips should be proportionate to the proposed unit rate for individual non-medical trips.

The service provider must strive to schedule medical rides with just three days advance notice whenever possible. The Department on Aging considers medical rides to be the highest priority service under this contract.

- c.** Responsibilities of the service provider include, but are not limited to, the following:
 - (1) Program administration,
 - (2) Scheduling of client rides,
 - (3) Passenger safety and vehicle maintenance,
 - (4) Maintaining and verifying driver and vehicle licenses,

- (5) Required safety training, including driver certification in passenger assistance, defensive driving, and first aid,
- (6) Maintaining required client, service, and financial records,
- (7) Measuring program outcomes established by Department on Aging, and
- (8) All other activities or requirements stated or implied by these Program/Service Guidelines.

Funding for Specialized Elderly Transportation Services comes, in part, from the Wisconsin Specialized Assistance Program for Counties (s.85.21) and is subject to provision of that statute and applicable laws, rules, and regulations. The vendor must provide data on mileage and service hours for s.85.21 funded services by July 31, 2014 (for January through June 2014) and January 31, 2015 (for July through December 2014) respectively. Funding for Specialized Elderly Transportation Services also comes, in part, from BCA (Base County Allocation) and Title III-B of the federal Older Americans Act of 1965, as amended, and subject to respective provisions of that law and other applicable laws, rules, and regulations.

- d.** Applicant must provide written evidence of their ability to provide Specialized Elderly Transportation Services throughout the contract period and must include complete descriptions of the following:

- (1) Day-to-day operations, including the reservation, scheduling, and dispatch functions.
- (2) The days or hours of advance notice usually required in scheduling service.
- (3) The age and capacity of vehicles to be used in providing this service, including a fleet roster listing the vehicle make and model year, vehicle identification number, and license plate number.
- (4) Schedules of vehicle maintenance, which includes information on how your vehicles are serviced and the degree to which major maintenance and repair occurs "in-house" versus through an outside service.

(Include in Section 2.0, Part 2a of Exhibit I)

- e.** Applicant must provide evidence of financial integrity and prior experience in contract administration through including (1) a certified audit, if available, or (2) an independent evaluation of services provided under contract with another public or private agency.

(Include as Appendix VI of Exhibit I)

- f.** Applicant must provide assurances that Specialized Elderly Transportation Services can and will be available throughout the contract year by describing, in detail, the plan to meet that requirement.

- g. Applicant must provide copies of the latest HSV (human service vehicle) inspection by the Wisconsin Department of Transportation of all vehicles listed within the fleet roster required under Section 1) d. (3) above.

(Include as Appendix IX of Exhibit I)

- h. Applicant must indicate their experience in providing transportation services to elderly participants. The applicant must submit a listing of public and private contracts under which it served Milwaukee County older adults during the past three years. This listing should include the following information:

- (1) Name of the agency or firm that awarded a contract,
- (2) Program(s) or service(s) provided under the contract,
- (3) Program year(s), and
- (4) Total units of service provided to older persons.

Department on Aging staff may contact each agency for information on the quality of services provided and levels of client satisfaction.

(Include as Appendix X of Exhibit I)

- i. Applicant proposing to subsidize the cost of Specialized Elderly Transportation Services through "other resources" must submit information on the source, nature, and dollar value of each resource. By definition, "other resources" may not include required match or estimates of client contributions.

(Include as Appendix XI of Exhibit I)

- j. Applicant must clearly indicate the procedures they will use to maintain accurate records of Specialized Elderly Transportation Services including (1) the name and address of each client served, (2) the origin and destination of trips provided, and (3) the date and time service occurs.

(Include in Section 2.0, Part 2b of Exhibit I)

- k. Applicant must estimate the total number of one-way rides they expect to provide during the contract year including arrangements with public agencies, private agencies, and individual customers.

(Include as Appendix XII of Exhibit I)

- l. Applicant must maintain minimum insurance coverage defined by Milwaukee County Risk Management in the following areas:

- (1) General Liability,
- (2) Automobile Liability,

- (3) Employers Liability and Workers Compensation, including waiver of subrogation,
- (4) Employee Dishonesty, and
- (5) Milwaukee County included as additional insured.

The Department on Aging may not award a contract until certificate(s) of insurance are reviewed and approved by Milwaukee County Risk Management.

- m.** Applicant must be willing to conform to all policies, specifications, and guidelines relating to the operation of Specialized Elderly Transportation Services as determined by the Department on Aging and Milwaukee County Commission on Aging.

2) Prohibited and Restricted Activities

The following are prohibited or restricted activities:

- a.** Activities that violate provisions of the Department on Aging purchase of service contract.
- b.** Transportation of older adults certified as eligible for service under one or more of the following: Family Care, Medical Assistance (Title 19), or Transit Plus.
- c.** Transportation outside the boundaries of Milwaukee County, unless authorized by the Department on Aging contract manager.

3) Initiation and Termination of Service

- a.** Specialized Elderly Transportation Services may begin once the Department on Aging determines an older adult in need of transportation services offered under this program.
- b.** Specialized Elderly Transportation Services will end once the Department on Aging determines an older adult no longer eligible for that service or find similar services available through another resource.

4) Eligible Clients

- a.** Clients must be age 60 or older and residents of Milwaukee County.
- b.** Clients must be "mobility impaired" and in need of specialized transportation services as determined by the Department on Aging. The phrase "mobility impaired" refers to a person's inability to use conventional means of public transportation for the purposes described in program/service guidelines.

- c. Priority must be given to older persons having the greatest economic and/or social need as defined by the Older Americans Act of 1965, as amended.

Under the Older Americans Act, the term "greatest economic need" refers to needs that result from monthly income at or below the federal poverty level. The term "greatest social need" refers to needs that result from non-economic factors such as (a) physical and mental disabilities, (b) language barriers, and (c) cultural, geographic, or social isolation. Factors of economic or social need may restrict the ability of an individual to live independently.

- d. Applicant must clearly describe the efforts it will make to target minority and low income older adults in need of specialized transportation services and refer them to the Department on Aging to determine eligibility.

(Include in Section 2.0, Part 2e of Exhibit I)

- e. The Department on Aging contract manager may at any time request a list of the name, street address, municipality, zip code, and telephone number of clients served under this contract. The service provider must submit the information requested within two working days.

5) Program Personnel, Training and Equipment

- a. Applicant must submit a staffing plan, including written job descriptions for each position involved in providing or administering this program.

(Include as Appendix I of Exhibit I)

- b. The service provider must screen all employees through a local and state-wide criminal background check and exclude from the staffing plan for Specialized Elderly Transportation Services any employee who might threaten the safety or well-being of older adults eligible for and participating in the program.
- c. Program staff must throughout the term of the contract meet the following training and/or certification requirements:
 - (1) All drivers must be insurable and possess good safety records.
 - (2) All drivers must possess a current and valid Wisconsin motor vehicle driver's license, Commercial Driver's License (if applicable), and a current and valid City of Milwaukee public passenger vehicle driver's license.
 - (3) All drivers must complete passenger assistance training, including the special needs of older adults, prior to participation in any Department on Aging transportation contract.

- (4) All drivers must maintain certification in first aid training. Initial certification must occur prior to participation in any Department on Aging transportation contract.
- (5) All drivers must maintain certification in defensive driving. Initial certification must occur prior to participation in any Department on Aging transportation contract.
- (6) All drivers and dispatch workers must be trained to handle emergency situations.
- (7) All drivers are urged to obtain certification in cardiopulmonary resuscitation (CPR) and maintain their certification.

(Include in Section 2.0, Part 3c of Exhibit I)

- d. The service provider must maintain an up-to-date driver-training file, available for inspection by the Department on Aging contract manager during regular business hours. The file must include the date and duration of each training session, name of instructor and topic(s) covered. The file must also include information on the licenses held by drivers and their certifications in passenger assistance, defensive driving, first aid, and CPR.
- e. While on duty, all drivers must wear forms of identification that contain the following information: (1) the driver's name and (2) the agency name or logo.
- f. Vehicles used to provide Specialized Elderly Transportation Services must be licensed as a "human service vehicle" (HSV) as required under Chapter 340 of Wisconsin Statutes. Information regarding human service vehicle licensing is available from the Wisconsin Department of Transportation.
- g. Any vehicle operating under contract with the Department on Aging must meet the requirements of the Wisconsin Administrative Code included in Chapter Trans 301 (Human Service Vehicles), including an annual HSV inspection conducted by the Wisconsin Department of Transportation.
- h. Any vehicle operating under contract with the Department on Aging must have standard safety equipment and include: (1) seat belts for each passenger and (2) special steps or ramps to aid passengers in boarding and leaving the vehicle. Each step or ramp must be of a design that is reasonable for persons of limited mobility to negotiate.
- i. Any vehicle used to provide Specialized Elderly Transportation Services must have a City of Milwaukee public passenger vehicles permit if required under Chapter 100 of the Milwaukee Code of Ordinances. Official application for public passenger vehicle permits must be filed with the City Clerk, be reviewed by the Utilities and Licensing Committee, and approved by the Milwaukee Common Council. Vehicles operated for the transportation of elderly and handicapped persons, and licensed as human service vehicles under Chapter 340 of Wisconsin Statutes, may be exempt from the public

passenger vehicle permit requirement. Contact the Office of the City Clerk for further information.

- j. Any transportation company operating with Department on Aging funds must display a corporate name and/or logo on the exterior of the vehicle.
- k. All vehicles operating with Department on Aging funds must display a sign that reads:
Funded by Milwaukee County Government.

6) Program Organization

- a. Applicant must show the agency's organizational structure and indicate how it will relate to the administration of this program.
- b. Applicant must identify the individual(s) within the contract agency who will be:
 - (1) Solely responsible for the program.
 - (2) Authorized to sign for the program.
 - (3) Authorized to receive checks for the program.
 - (4) Responsible for fiscal and budgetary matters.
 - (5) Responsible for data collection, analysis and completion of reporting forms.
 - (6) Responsible for internal monitoring of the program.
 - (7) Responsible for responding to client concerns regarding service quality.

(Include as Appendix XIII of Exhibit I)

7) Communication and Maintenance

- a. Applicant must be able to communicate with vehicles by two-way radio to assure prompt and efficient service.
- b. Applicant must maintain vehicles used to transport older adults according to manufacturers' specifications. Maintenance should take place on a scheduled basis, with detailed records kept to document the work done on each vehicle.
- c. Applicant must have auxiliary vehicles available if there is a breakdown.

8) Program Service Coordination

- a.** The provider of Specialized Elderly Transportation Services must coordinate this service with other programs and services for older adults. The applicant must provide information regarding their experience in coordinating aging programs and services.
- b.** Applicant must clearly describe an emergency plan for maintaining the provision of services to older adults. Include provisions for staff absenteeism, vehicle breakdowns and severe weather.

9) Contributions and Co-Payments

- a.** Under Specialized Elderly Transportation Services, a participant (1) must have the opportunity to make voluntary contributions toward the cost of one-way non-medical rides and (2) must make a \$3.00 co-payment toward the cost of each one-way medical ride.
- b.** Applicant must provide written evidence of an ability to solicit, collect, and record voluntary client contributions. The evidence must include a clear description of the handling and reconciliation of cash contributions. Procedures must be in accord with the Older Americans Act and Department on Aging policies.
- c.** Contributions must be voluntary, confidential, and related to the cost of the services provided. Solicitation of voluntary contributions must always respect the dignity and confidentiality of older adults. Contributions are voluntary and under absolutely no circumstances will availability of service depend on the client making a contribution. If the applicant agency plans to solicit contributions, include an example of such appeal letter as **Appendix VII**.
- d.** Clients may deposit contributions directly into a locked box. The locked box must be clearly labeled and securely mounted inside the vehicle. Under no circumstances should a driver handle client contributions. The requirement for a locked box may be waived by the Department on Aging contract manager if twice yearly the service provider agrees to distribute to passengers an appeal letter and pre-addressed envelope enabling passengers, at the passenger's discretion, to mail a contribution in support of the program back to the service provider.
- e.** Voluntary contributions for non-medical rides and required co-payments for medical rides must each be clearly recorded and deposited in a bank account at least weekly and more often whenever possible. The service provider must acknowledge in writing all contributions mailed to the service provider.
- f.** Client contributions will be used to provide additional service.

10) Outcomes

Three measured outcomes for the 2014 Specialized Elderly Transportation Services contract is based on how long clients wait for return rides from a medical appointment. The first outcome, based on a client satisfaction survey, requires 90% or more reporting they wait 40 minutes or less for a return ride from a medical appointment. The second outcome, also based on a client satisfaction survey, requires 70% or more reporting they usually wait 30 minutes or less for a return ride. The final outcome, based on data collected by the service provider, is an average wait time of 30 minutes or less each month during the contract year.

11) Service Reimbursement

- a.** Service provided under the Specialized Elderly Transportation Services program will be reimbursed on the basis of a "unit of service" defined as a one-way ride. On Page 1, Exhibit I (or printed on a separate sheet of paper if sufficient space is not available on Page 1, Exhibit I), applicants must specify a minimum of five unit rates, including the following:

- (1) One rate for individual medical rides that factors the \$3.00 co-payment
- (2) One rate for individual non-medical rides
- (3) One rate for individual small group rides to meal sites or for shopping
- (4) One rate for group grocery shopping
- (5) One rate for group meal site

Unless otherwise noted within Section 1) a., individualized rides typically involve three or fewer passengers, while group rides typically involve four or more passengers.

- b.** Before a contract is executed, a fuel price adjustment provision may be added as an addendum to these guidelines and based on monthly Midwest Diesel Fuel Prices as provided by the Energy Information Administration (EIA) of the U.S. Department of Energy.

Appendix I

Group Grocery Shopping

The vendor must transport groups of eligible clients from the following elderly housing sites every week to an area grocery store chosen by program participants. Unless waived by the Department on Aging contract manager, the grocery store must be within a three mile radius of participant housing. The grocery service includes assisting clients with carrying bags and parcels. Some of these locations are apartment complexes with multiple addresses. All eligible clients within the apartment complex must be served.

Arlington Court Apartments

1633 North Arlington Place

Calvary Gardens

1555 West Chambers Street

Cambridge Apartments

1743 North Cambridge Avenue

College Court Apartments

3334 West Highland Boulevard

Courtyard Apartments

12250 West North Avenue

Fernwood Court Apartments

6700 West Appleton Avenue

Garden Apartments

3425 North 60th Street

Gatehouse Apartments

833 North 14th Street

Statehouse Apartments

955 North 14th Street

Grand Haven Apartments

520 North 20th Street

Glen Court Apartments

6101 North Green Bay Road

Golda Meir Apartments

1567 North Prospect Avenue

Hadley Terrace Apartments

3515 West Hadley Street

Hampton Gardens Apartments

4821 North 22nd Street

James & John Apartments

8614 West Fond du Lac Avenue

Melvin Battle House

3131 North Martin Luther King Drive

Plymouth Hill Apartments

826 West Galena Street

Ridgewood Apartments

7450 West Glenbrook Road

Riverview Apartments

1300 East Kane Place

St. Peters Apartments

6550 North 80th Street

Westridge Apartments

7901 West Glenbrook Road

White Birch Apartments

9239 North 75th Street

Bayview Manor Apartments

740 East Linus Street

Becher Court Apartments

1800 West Becher Street

Booth Manor Apartments

150 West Centennial Drive

Boulevard Apartments

2627 West Lapham Boulevard

Burnham Village Apartments

5202 West Burnham Street

Canticle Court Apartments

3201 South Lake Drive

Juniper Court Apartments

3209 South Lake Drive

Clement Manor Apartments

9339 West Howard Avenue

Cottonwood Trails Apartments

4600 South Nicholson Avenue

The Courts Apartments

195 West Puetz Road

Crocus Court Apartments

6809 Crocus Court

Euclid Arms Apartments

3130 South 20th Street

Evergreen Square Apartments

3717 East Ramsey Avenue

Faircrest Apartments

1920 East Tripoli Avenue

Grant Park Apartments

2825 South Chicago Avenue

Greenbrook Apartments

4925 South Greenbrook Terrace

Heritage House Apartments

11515 West Cleveland Avenue

LaFollette Apartments

720 South 92nd Street

Lake Forest Apartments

8471 South Chicago Road

Layton Garden Apartmentd

2230 West Layton Avenue

Lincoln Court Apartments

2325 South Howell Avenue

Mercy Apartments

1720 South 29th Street

Mitchell Court Apartments

2600 West National Avenue

Oak West Apartments

11102 West Oklahoma Avenue

Park Bluff Apartments

555 South Layton Avenue

Ridgedale Apartments

7720 West Grange Avenue

Southgate Retreat Apartments

3325 South 26th Street

Southgate Square Apartments

3775 South 27th Street

Sunrise Apartments

8750 West National Avenue

Thompson Meadows Apartments

3120 East Norwich Avenue

Washington Square Apartments

4816 South Packard Avenue

The Woods Apartments

3311 West College Avenue

South 27th Street Shoppers

6010 South 27th Street

South 77th Street Shoppers

3141 South 77th Street

Appendix II

Group Meal Sites

This program provides advanced scheduled, door-to-door service to transport eligible older adults to designated meal sites of the Milwaukee County Senior Meal Program.

Since program usage depends upon individual client choice and need, group sizes vary each time service is provided. When low usage warrants, service to a particular meal site may be discontinued and a new site added based on mutual agreement between the service provider and the Milwaukee County Department on Aging.

<u>Meal Site</u>	<u>Address</u>
1. Arlington Court	1633 North Arlington Place
2. Bethesda Community Senior Center	2845 West Fond du Lac Avenue
3. Beulah Brinton	2555 South Bay Street
4. Lakeside Senior Enrichment Program	1410 North Prospect Avenue
5. McGovern Park Senior Center	4500 West Custer Avenue
6. Milwaukee Christian Center	2137 West Greenfield Avenue
7. The Elks Lodge #46	5555 West Good Hope Road
8. OASIS (formerly Fifty-Five Plus)	2414 West Mitchell Street
9. Project Focal Point	811 West Burleigh Street
10. Clinton Rose Senior Center	3045 North Dr. Martin Luther King, Jr. Drive
11. Washington Park Senior Center	4420 West Vliet Street
12. West Allis Senior Centor	7001 West National Avenue
13. Additional meal sites approved by the Milwaukee County Department on Aging contract manager.	
14. This program offers transportation to about seventy-five Hmong elders. The group participates in the Milwaukee County Senior Meal Program at Milwaukee Christian Center and occasionally attends Milwaukee County Senior Meal Program at Milwaukee Christian Center and occasionally attends Friday programming at Washington Park Senior Center.	

Appendix III

Individual and Small Group Rides to Nutrition Meal Sites

This program provides advanced scheduled, door-to-door service to transport eligible older adults to designated meal sites of the Milwaukee County Senior Meal Program.

Since program usage depends upon individual client choice and need, group sizes vary each time service is provided. When low usage warrants, service to a particular meal site may be discontinued and a new site added based on mutual agreement between the service provider and the Milwaukee County Department on Aging.

<u>Meal Site</u>	<u>Address</u>
1. Asian American Community Center	120 North 73rd Street
2. Franklin Senior Center	9229 West Loomis Road
3. Grobschmidt Senior Center	2424 15 th Avenue (South Milwaukee)
4. Hart Park Senior Center	7300 Chestnut Street (Wauwatosa)
5. Warnimont/Kelly Senior Center (Tuesdays only)	6100 South Lake Drive (Cudahy)
6. Wilson Park Senior Center	2601 West Howard Avenue
7. Additional meal sites approved by the Milwaukee County Department on Aging.	